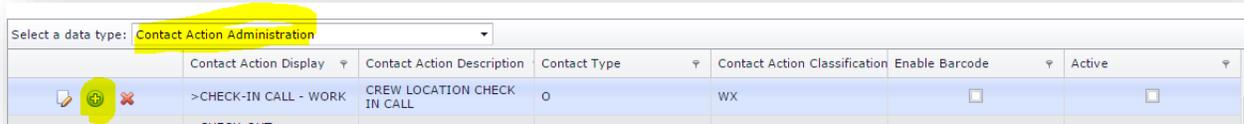
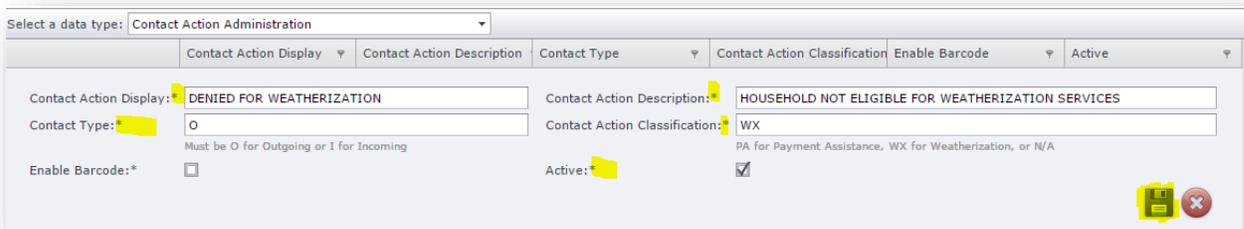


## How to track WX Denial in ServTraq

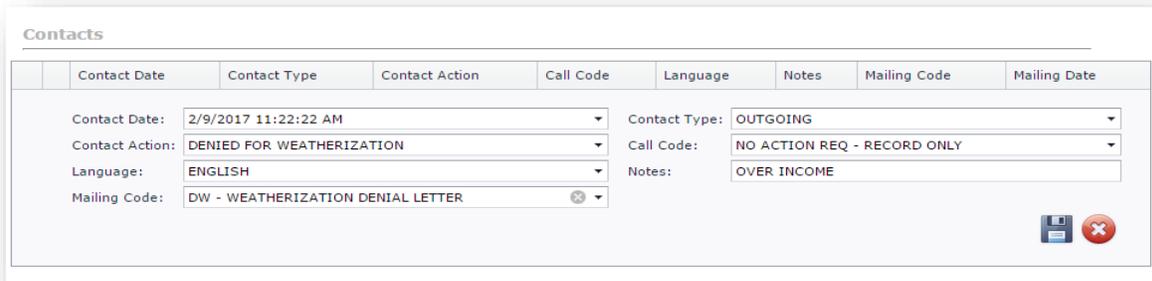
You can create a contact action specifically to track WX denials by going to **Admin>Data Admin** and selecting data type: **Contact Action Administration**. Click on the *plus icon* to add a new contact action.



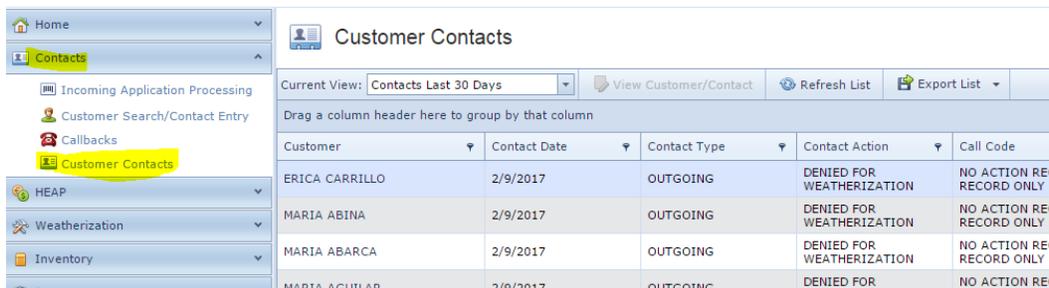
Complete the fields required, and check the box "active". Finish by click on the *floppy disc icon* to save.



Within the Customer Record, you can use the Contact Entry Note feature to track customers who are denied for weatherization services. You have the option to document additional information in the **Notes** section as well as creating a **mail letter**.



To run a report on Denied weatherization customers entered: Go to **Contacts> Customer Contacts**



Click on the *filter icon* for **Contact Action** and check the box for “Denied for Weatherization” (Note: this can differ based on what you named the Contact Action) and click **OK**.

Customer Contacts

Current View: **Contacts Last 30 Days** | View Customer/Contact | Refresh List | Export List | Enter Search Criteria

Drag a column header here to group by that column

	Contact Date	Contact Type	Contact Action	Call Code	Language	Notes
LO	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	(Select All)		ALREADY WEATHERIZED
	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	<input checked="" type="checkbox"/> DENIED FOR WEATHERIZATION		ALREADY WEATHERIZED
A	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	<input type="checkbox"/> PROGRAM/APPLICATION INFO GIVEN		ALREADY WEATHERIZED
R	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION			OVER INCOME
	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION			ALREADY WEATHERIZED
ALEZ	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	RECORD ONLY		OVER INCOME
OZA	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	
	1/10/2017	OUTGOING	PROGRAM/APPLICATION INFO GIVEN	NO ACTION REQ - RECORD ONLY	ENGLISH	ADDED FROM APPLICATION E

OK | Cancel

Next, click on the **link** located at the bottom of the screen to open the *filter builder*. Here you are going to set the date parameter for your report.

Customer Contacts

Current View: **Contacts Last 30 Days** | View Customer/Contact | Refresh List | Export List | Enter Search Criteria

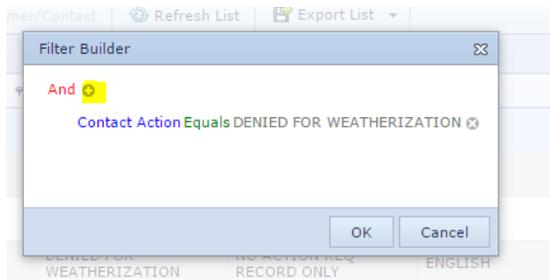
Drag a column header here to group by that column

	Contact Date	Contact Type	Contact Action	Call Code	Language	Notes
LO	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	ALREADY WEATHERIZED
	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	ALREADY WEATHERIZED
A	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	ALREADY WEATHERIZED
R	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	OVER INCOME
	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	ALREADY WEATHERIZED
ALEZ	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	OVER INCOME
OZA	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	

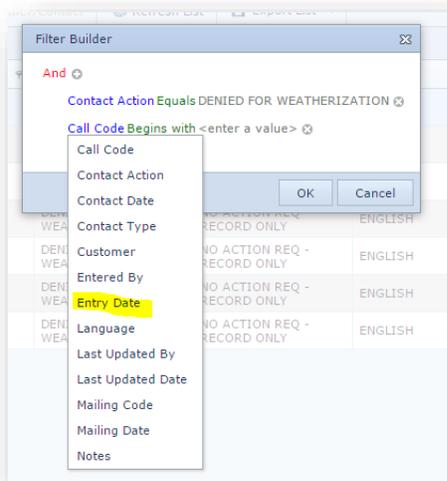
Page 1 of 1 (7 items) | 1

[Contact Action] Equals 'DENIED FOR WEATHERIZATION'

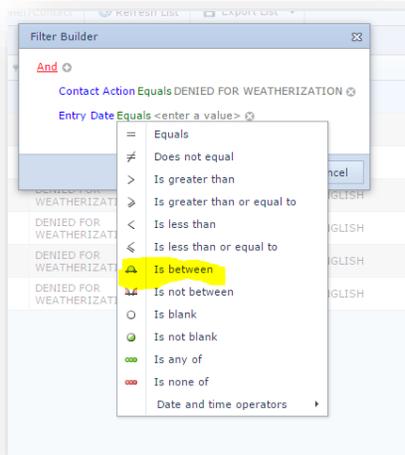
Click on the *plus icon* to set your date parameters.



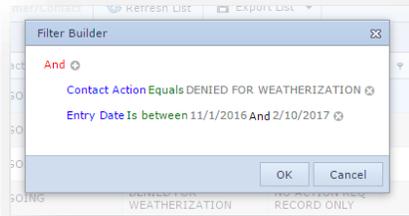
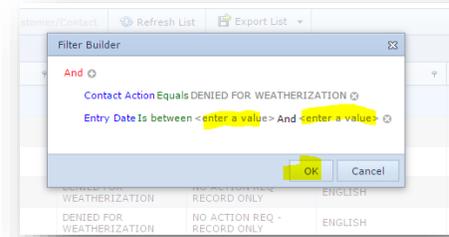
Click on “Call Code” and select “Entry Date”



Click on “Equals” and select “Is Between”



Enter a start and end date and click "OK"



Your results will generate in the screen. To **print** report click on the **Export List** tab. A drop down menu will appear and select from the options.

